DELEGIES MASTERY

FOR X VIRTUAL ASSISTANTS



XIRTUAL SSISTANTS

AIFOR SOPS

What Is Loom?

A simple screen-recording tool that captures your desktop (and optional camera) plus your voice—no editing software required.

Why Loom + AI Workflows?

- Visual Clarity: Show every click, menu, and field in real time.
- Automatic Time-Stamping: Your narration syncs to exact moments, so SOP steps align perfectly.
- One-Click SOP Drafts: Loom's Al turns your recording into a structured, bullet-point document in seconds.

Benefits for Non-Tech Users

- No Complex Software: Record using only Loom's browser or desktop app.
- Instant SOP Creation: Hit "Create SOP"—the AI handles formatting and structure.
- Consistent Quality: Every process follows the same clean format, ensuring your XVA never misses a step.



DELEGIEGE MANAGEMENT

Easy Delegation Workflow

1. Record:

a. Capture your routine task in under 5 minutes.

2. Generate:

a. Click "Create SOP"—Loom Al drafts your document in seconds.

3. Customize:

a. Add your logo, screenshots, and tips (no heavy lifting).

4. Delegate:

a. Share the SOP link—your XVA is ready to learn and execute.



ACCUMITATION OF THE SETUP

1. SIGN UP AT LOOM.COM

A. USE YOUR BUSINESS EMAIL

2. UPGRADE TO LOOM BUSINESS + AI

A.(AI SOP WORKFLOWS) UNDER SETTINGS → SUBSCRIPTION

3. IN YOUR CLOUD DRIVE (GOOGLE DRIVE/DROPBOX)

A. CREATE A FOLDER CALLED "SOPS"

4. INSIDE IT, ADD SUBFOLDERS:

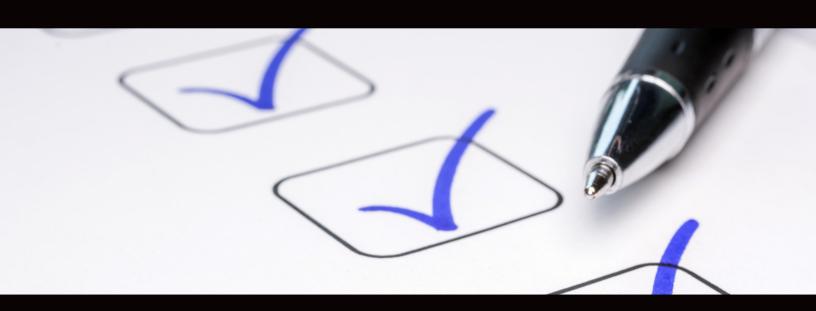
A. 01_ADMIN, 02_MARKETING, 03_PERSONAL, 04_TECHNICAL





SELECTION

- 1. AUDIT YOUR WEEKLY TASKS & NOTE HOURS SPENT
- 2. HIGHLIGHT TASKS > 2 HRS/WEEK
- 3. START SELECTING TIME-CONSUMING TASKS TO DELEGATE
- 4. TITLE YOUR SOP VIDEO: "SOP [TASK NAME] [DATE]"





RECORD WITH LOOM

- 1. OPEN LOOM → NEW → SCREEN + CAM (OR SCREEN ONLY)
- 2. CONFIGURE MIC, SCREEN/WINDOW, OPTIONAL CAM
- 3. CLICK START RECORDING, NARRATE EVERY CLICK CLEARLY
- 4. CLICK STOP; NAME VIDEO PER YOUR SOP TITLE





GENERATE AND SOP

- 1.IN LOOM DASHBOARD OPEN YOUR VIDEO
- 2. CLICK THE AI ICON → CREATE SOP
- 3. COPY OR DOWNLOAD THE GENERATED DRAFT





CUSTOM/ZE & FINALIZE

- 1. PASTE DRAFT INTO A NEW GOOGLE DOC (OR ONEDRIVE/DROPBOX)
- 2. INSERT YOUR LOGO & APPLY BRAND FONTS/COLORS
- 3. REPLACE GENERIC TERMS WITH SPECIFICS (E.G., "SELECT CALENDAR TAB")
- 4. ADD SCREENSHOTS OR CALLOUT TIPS AS NEEDED
- 5. SAVE AS TASKNAME SOP V1.0





ORGANIZE TO THE COLOR OF THE CO

- 1. MOVE THE FINALIZED SOP INTO THE CORRECT SOP SUBFOLDER
- 2. SHARE SOPS FOLDER WITH PERMISSIONS:
 - A. EDITOR → SELECT WHO HAS ACCESS TO EDIT

 THE SOP
 - B. VIEWER → SELECT WHO HAS ACCESS TO VIEW
 THE SOP





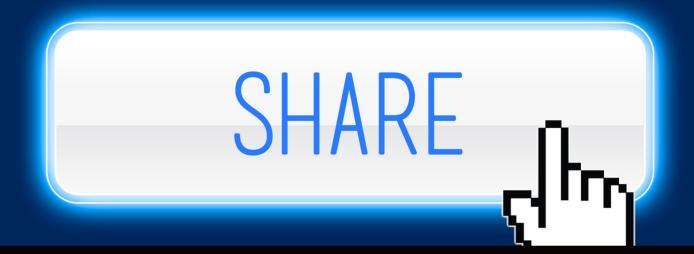
SHARE MINA

- 1. COPY THE SOPS ROOT FOLDER LINK
- 2. EMAIL YOUR SUCCESS MANAGER:

A. SUBJECT: "SOPS - READY FOR AI COPILOT"

B. BODY: GREETING, FOLDER LINK, SOP LIST,

PRIORITY TASK



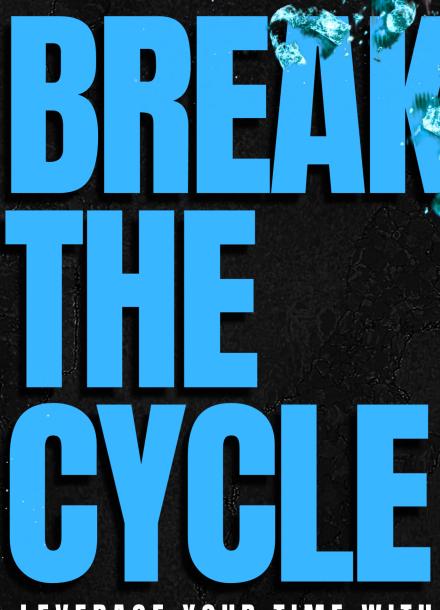


& SCALE

- 1. MONTHLY: 15-MIN SOP CHECK-IN WITH YOUR TEAM
- QUARTERLY: AUDIT SOPS → ARCHIVE OLD, ADD
 NEW
- 3. **DOCUMENT EVERY NEW PROCESS WITH THIS CHECKLIST**
- 4. QUARTERLY: 30-MIN TEAM WALKTHROUGH OF UPDATED SOPS







LEVERAGE YOUR TIME WITH

